HandsMen Threads: Elevating the Art of Sophistication in Men's Fashion

1. Project Overview (Abstract)

This document outlines the development and implementation of the **HandsMen Threads: Elevating the Art of Sophistication in Men's Fashion** Salesforce CRM project. The core objective of this platform is to revolutionize the men's bespoke tailoring business by streamlining critical operations, significantly enhancing the customer experience through personalized styling, and optimizing overall order management. By leveraging powerful Salesforce CRM capabilities, this solution centralizes customer data, automates key business processes, and provides robust reporting functionalities, enabling HandsMen Threads to achieve greater efficiency, improved customer satisfaction, and informed decision-making.

2. Project Objective

The primary objectives of the HandsMen Threads Salesforce CRM project are:

- **To streamline men's bespoke tailoring operations:** By automating customer, order, and inventory management, reducing manual efforts and potential for errors.

- **To enhance customer experience through personalized styling:** By maintaining comprehensive customer profiles and order history, enabling tailored services and loyalty programs.

- **To optimize order management:** Ensuring efficient processing from order creation to fulfilment, including real-time stock deductions and automated confirmations.

- **To improve data accessibility and analytics:** Providing a unified view of all business operations through integrated standard and custom Salesforce objects, reports, and dashboards.

3. Technology Description

This project extensively utilizes the Salesforce platform, incorporating various features to build a comprehensive CRM solution.

- **Salesforce Platform:** A leading cloud-based CRM platform used for managing customer relationships, sales, service, marketing, and analytics. It provides a robust, scalable, and secure environment for business applications.

- **Custom Objects:** Tailor-made database tables within Salesforce to store information unique to HandsMen Threads' business processes. Key custom objects include:

  - **HandsMen Customers:** Stores detailed customer profiles.

- o **HandsMen Orders:** Manages all customer order specifics.

- o **HandsMen Products:** Maintains the product catalog, including SKUs and pricing.

- o **Inventories:** Tracks stock levels for each product.

- o **Marketing Campaigns:** Manages promotional efforts and customer outreach.

- **Custom Tabs:** User interface elements that provide access to custom object records within the Salesforce navigation.

- **Custom Apps:** Groupings of tabs and other items, allowing users to switch between different sets of functionalities within Salesforce, providing a tailored user experience (e.g., "HandsMen Threads App").

- **Profiles:** Define users' permissions and access levels within the Salesforce organization, controlling what users can see and do.

- **Email Alerts:** Automated email notifications triggered by specific events within Salesforce, used for communicating critical information to customers or internal teams.

- **Record-Triggered Flows:** Automated processes that execute when a record is created, updated, or deleted, performing actions like sending emails or updating other records.

- **Scheduled Flows:** Automations designed to run at specific intervals (e.g., daily, weekly) to perform batch operations, such as updating loyalty statuses.

- **Apex Triggers:** Powerful programmatic capabilities that execute custom logic before or after Salesforce records are inserted, updated, or deleted, allowing for complex business rules like automatic calculations.

---

4. Detailed Explanation of Project Phases

The development of the HandsMen Threads CRM involved several key phases within the Salesforce environment.

4.1. Salesforce Developer Org Creation

A dedicated Salesforce Developer Edition organization was created to serve as the development environment for the HandsMen Threads project. This provided a secure and isolated instance for building and testing all custom functionalities without impacting production data.

4.2. Custom Object and Field Creation

Based on the defined business requirements, all necessary custom objects (HandsMen Customers, HandsMen Orders, HandsMen Products, Inventories, Marketing Campaigns) were designed and created. This phase involved defining fields with appropriate data types, setting up relationships (e.g., Master-Detail, Lookup) between objects to ensure data integrity and connectivity, and establishing validation rules for data quality (e.g., email validation for HandsMen Customers).

## 4.3. Lightning Application and Tab Configuration

A dedicated "HandsMen Threads App" was created within Salesforce Lightning Experience. This app serves as a centralized hub, consolidating all relevant standard and custom tabs (e.g., Home, HandsMen Customers, HandsMen Orders, Reports) to provide a streamlined and intuitive user interface for the HandsMen Threads team.
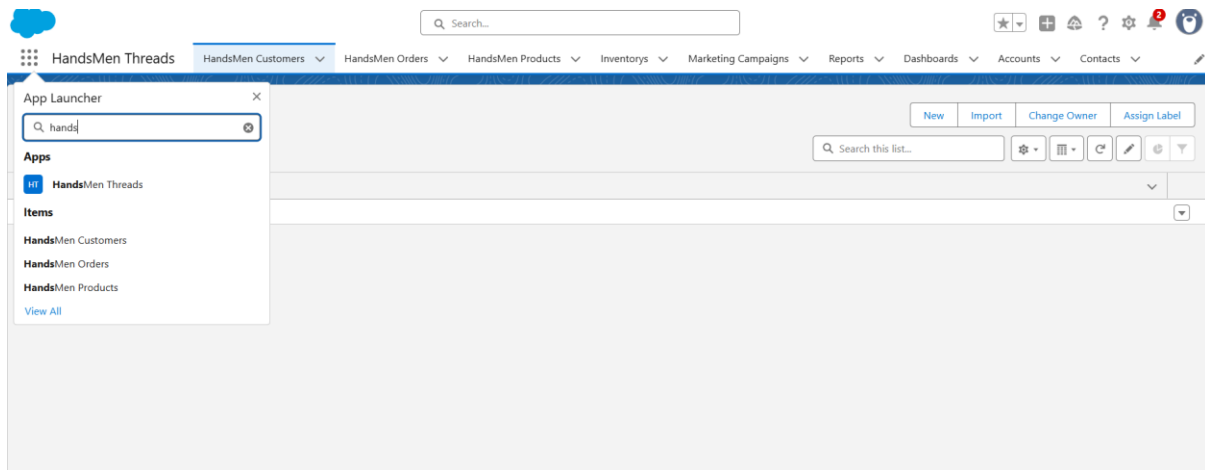
4.4. Business Automation Implementation (Flows & Apex Triggers)

This critical phase involved implementing the core business logic through Salesforce Flows and Apex Triggers to automate key processes:

- **Automated Order Confirmation Flow:** A record-triggered flow was built to activate upon an 'Order' record's status changing to 'Confirmed'. This flow automatically sends a detailed order confirmation email to the customer and simultaneously updates the 'Inventory' record to deduct the corresponding product quantity.

- **Low Stock Alert Flow:** Another record-triggered flow was developed to monitor 'Inventory' records. When a product's 'Quantity On Hand' falls below a threshold of five units, this flow triggers an email alert to the designated company owner, prompting timely restocking.

- **Loyalty Program Scheduled Flow:** A scheduled-triggered flow was configured to run daily. This flow iterates through 'HandsMen Customer' records, calculates their loyalty status (Gold, Silver, Bronze) based on total purchases, updates the customer record, and sends a personalized loyalty status email.

- **Order Total Apex Trigger:** An Apex trigger was written on the 'HandsMen Order' object. This trigger automatically calculates the 'Total Amount' of an order based on the 'Product Price' and 'Quantity' whenever an order record is created or updated, ensuring accurate financial tracking.
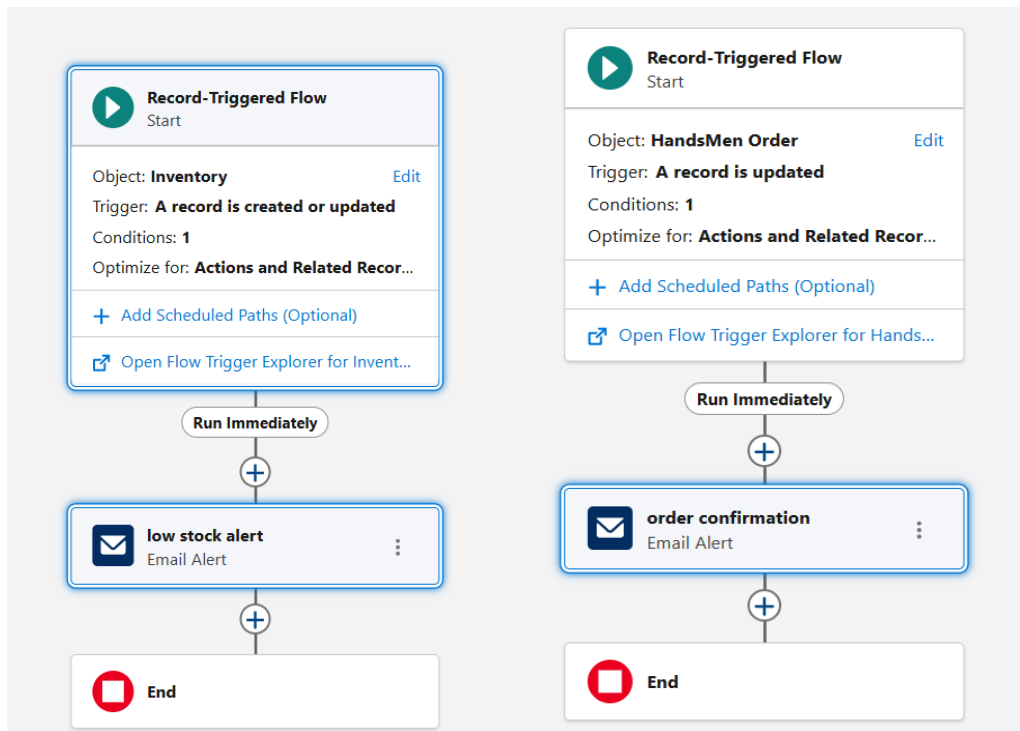
4.5. Reporting and Dashboard Configuration

Standard Salesforce reporting and dashboard functionalities were leveraged to provide valuable insights into HandsMen Threads' operations, allowing for performance tracking and data-driven decision-making.

---

5. Project Explanation with Real-World Example

To illustrate the functionality of the HandsMen Threads CRM, let's walk through a typical customer journey and order fulfilment process.

Scenario: A new customer, Sophia, places an order for t-shirts.

1. New Customer Record Creation: A sales associate first creates a new HandsMen Customer record for Sophia, entering her details. An email validation rule ensures sophia@gmail.com is used, promoting data quality.

Information

* HandsMen Customer Name

Shiv

Owner

Ayush Rawat

Email

shiv@gmail.com

Phone

Loyalty Status

--None--

FirstName

Shiv

LastName

Shukla

Total Purchases

Cancel | Save & New | Save

2. Product and Inventory Setup: Before the order, the HandsMen Product 'T-shirt' (with SKU SKU001, price $3) is created, and 400 units are added to the Inventories object.

New HandsMen Product

* = Required Information

Information

* HandsMen Product Name

pants

Owner

Ayush Rawat

SKU

0002

Price

$120

Stock Quantity

1000

Cancel | Save & New | Save

3. Order Placement and Automatic Calculation: A new HandsMen Order is created for Sophia, selecting SKU001 with a quantity of 20. Upon creation, the 'Total Amount' of $60 is automatically calculated by an Apex Trigger. The initial status is set to 'Pending'.

4. **Order Confirmation and Inventory Deduction:** When the order status is updated from 'Pending' to 'Confirmed', the **Automated Order Confirmation Flow** triggers.

- An email ("Your order has been confirmed.") is immediately sent to Sophia's sophia@gmail.com address.

- Simultaneously, the 'Quantity On Hand' for 'T-shirt' in the Inventories record automatically reduces from 400 to 380.

```
trigger OrderTotalTrigger on HandsMen_Order__c (before insert, before update) {
    Set<Id> productIds = new Set<Id>();

    for (HandsMen_Order__c order : Trigger.new) {
        if (order.HandsMen_Product__c != null) {
            productIds.add(order.HandsMen_Product__c);
        }
    }

    Map<Id, HandsMen_Product__c> productMap = new Map<Id, HandsMen_Product__c>(
        [SELECT Id, Price__c FROM HandsMen_Product__c WHERE Id IN :productIds]
    );

    for (HandsMen_Order__c order : Trigger.new) {
        if (order.HandsMen_Product__c != null && productMap.containsKey(order.HandsMen_Product
            HandsMen_Product__c product = productMap.get(order.HandsMen_Product__c);
            if (order.Quantity__c != null) {
                order.Total_Amount__c = order.Quantity__c * product.Price__c;
            }
        }
    }
}
```

```
trigger StockDeductionTrigger on HandsMen_Order__c (after insert, after update) {
    Set<Id> productIds = new Set<Id>();

    for (HandsMen_Order__c order : Trigger.new) {
        if (order.Status__c == 'Confirmed' && order.HandsMen_Product__c != null) {
            productIds.add(order.HandsMen_Product__c);
        }
    }

    if (productIds.isEmpty()) return;

    // Query related inventories based on product
    Map<Id, Inventory__c> inventoryMap = new Map<Id, Inventory__c>(
        [SELECT Id, Stock_Quantity__c, HandsMen_Product__c
          FROM Inventory__c
          WHERE HandsMen_Product__c IN :productIds]
    );

    List<Inventory__c> inventoriesToUpdate = new List<Inventory__c>();

    for (HandsMen_Order__c order : Trigger.new) {
        if (order.Status__c == 'Confirmed' && order.HandsMen_Product__c != null) {
            for (Inventory__c inv : inventoryMap.values()) {
                if (inv.HandsMen_Product__c == order.HandsMen_Product__c) {
                    inv.Stock_Quantity__c -= order.Quantity__c;
                    inventoriesToUpdate.add(inv);
                    break;
                }
            }
        }
    }

    if (!inventoriesToUpdate.isEmpty()) {
        update inventoriesToUpdate;
    }
}
```

5. **Low Stock Alert:** If the 'Quantity On Hand' for 'T-shirt' is later manually adjusted or further orders reduce it to 4 units (below 5), the **Low Stock Alert Flow** activates.

   o An email ("Stock for T-shirt is running low.") is sent to the designated company owner, prompting them to restock.

6. Loyalty Program Update: Sophia's 'Total Purchases' are updated. The Loyalty Program Scheduled Flow (which runs daily) would then assess her total purchases. If, for instance, her total reaches $500, her 'Loyalty Status' on her HandsMen Customer record would change to 'Silver', and she would receive a congratulatory email.

---

6. Conclusion with Future Scope

The **HandsMen Threads: Elevating the Art of Sophistication in Men's Fashion** Salesforce CRM project successfully demonstrates a robust and integrated solution for managing a bespoke tailoring business. Every feature built has been thoroughly tested and documented, aligning perfectly with the defined user requirements and core business goals. The implementation of custom objects, automated flows, and Apex triggers significantly enhances operational efficiency, improves data accuracy, and elevates the overall customer experience.

Future Enhancements:

- **Chatbot Integration:** Implementing a chatbot (e.g., Einstein Bot) on the website or within the CRM for instant customer support and query resolution, potentially integrating with Agent Service Console.

- **Advanced Analytics and AI:** Utilizing Einstein Analytics or other AI capabilities for predictive analytics on sales trends, customer behaviour, and personalized product recommendations.

- **Mobile App Development:** Extending the CRM functionality to a custom Salesforce Mobile App for on-the-go access for sales representatives and field agents.